Correspondence Guide

Oracle Financial Services Lending and Leasing

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ORACLE

Correspondence Guide
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Oracle Financial Services Software Limited

Oracle Park

Off Western Express Highway
Goregaon (East)
Mumbai, Maharashtra 400 063
India
Worldwide Inquiries:
Phone: +91 22 6718 3000
Fax:+91 22 6718 3001
www.oracle.com/financialservices/

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1. Preface

The Correspondence screen enables you to setup the system's correspondence and explains how to setup ad hoc correspondence with the Correspondence form.

The Correspondence pages provide a cost-effective and easy to use method to build custom documents that draw information from the system's database without additional programming. You can choose what to include in a letter, create a template, and then use this template to produce a letter.

The core of the Correspondence module is the document element -- the information stored in the database merged into the correspondence. The system has document elements defined for commonly used data elements in correspondence, such as account numbers, account balances, customer addresses, telephone numbers, and due dates.

Correspondence consists of a document file with text of your choice and the document elements from the system's database. You can create a correspondence set that consists of one or more documents. If a correspondence set consists of more than one document, such as the account details letter and a payment overdue letter, it prints both documents every time the system generates correspondence for a customer.

2. Creating Correspondence

The Correspondence screen enables you to define who will receive the documents you created on the Document Definition page by creating correspondence sets. Each document must belong to a set, and a set can have more than one document.

You can set up the various documents and the data fields that the system compiles together when creating a correspondence. The system provides two different document formats: Word or XFDF: XML-based format.

Note

Oracle Financial Services Software assumes that the user is familiar with Word and the Merge Document command. If the user is creating e-form documents with XFDF, then Oracle Financial Services Software assumes that person is familiar with Adobe forms.

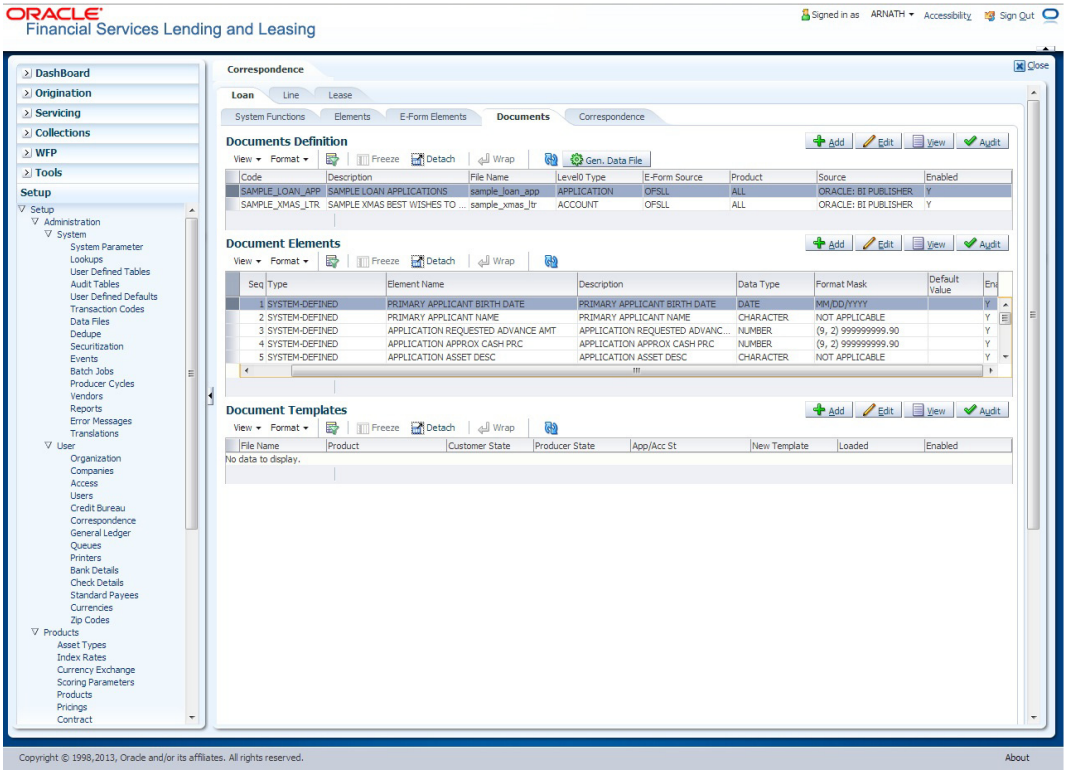
To create a Correspondence

1. On the Oracle Financial Services Lending and Leasing home page, click **Setup→Setup→ Administration→User→Correspondence→Loan/Line/Lease→Documents**
2. In the Document definition block, add a record. *For example:* SAMPLE_LOAN_APP

A brief description is given below:

Field:	Do this:
Code	Specify the document code to define the name for the new document.
Description	Specify the document description for the new document. This entry appears in the **Correspondence** section on the Request page, when you generate an ad hoc correspondence.
File Name	Specify the document file name for the resulting file (Word or XFDF document).
Level0 Type	Select the level0 type from the drop-down list.
E-form Source	Select the element e-form source from the drop-down list.
Product	Select the document product from the drop-down list.
Source	Select the document source type from the drop-down list.
Enabled	Check this box to enable the document definition.

3. In the **Document Elements** section, add the elements required in the correspondence.

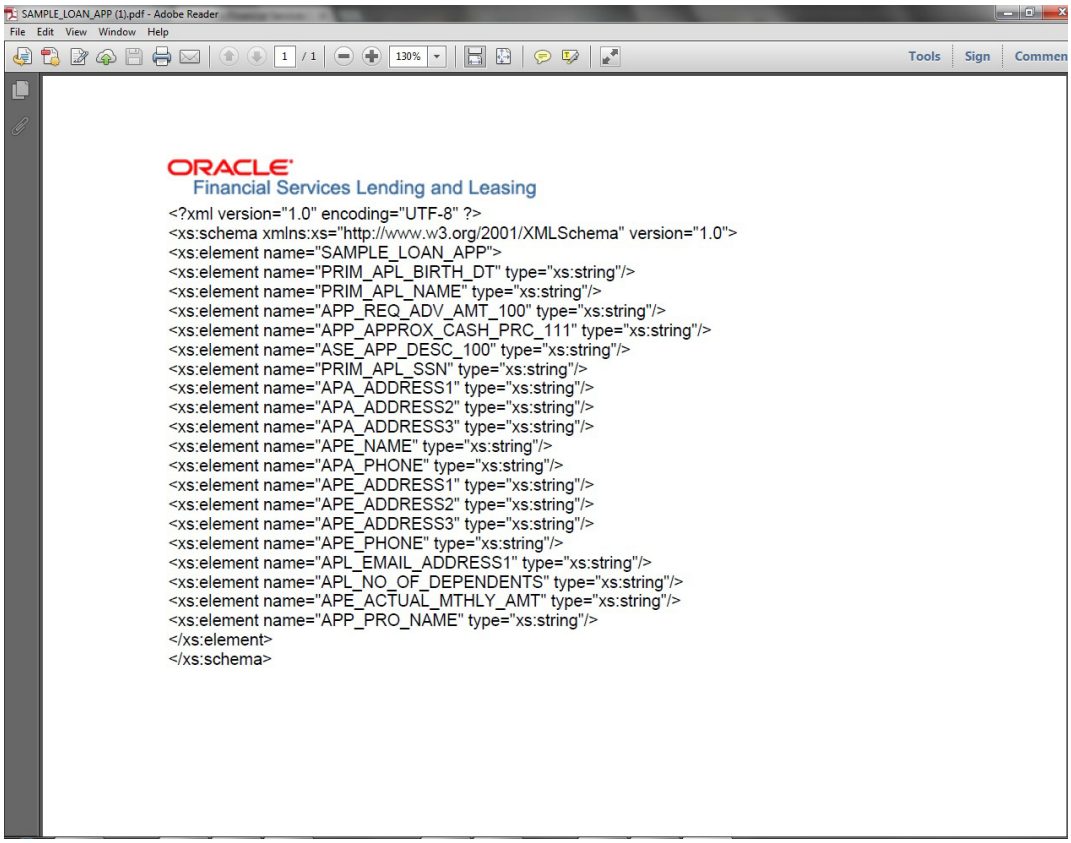


A brief description of the fields are given below:

Field:	Do this:
Seq	Specify the sequence number to order the document elements.
Type	Select element type from the following from the drop-down list. This list provides the following options: *System-defined* – If you select, the value is supplied by the system and cannot be changed in the Correspondence Request page. *Constant.* *User Defined Element* – If you select, you can choose the value and change it in the Correspondence Request screen. *User Defined Constant* – If you choose, you can choose the value, but you cannot change it in the Correspondence Request screen. *Translated Element* – If a document contains an e-form element and you do not select this option, then the value will not be translated.
Element Name	Select the element name from the drop-down list.

Field:	Do this:
Description	Specify element description. **Notes**: 1. Check that the element name does not have blank spaces or special characters, such as the forward slash “/” or backward slash “\”. 2. If the element is system-defined, then the system will automatically complete this field..
Data Type	Select the element data type from the drop-down list.
Format Mask	Select the element format mask from the drop-down list.
Default Value	Specify the element default value.
Enabled	Check this box to include the element in the document.

4. Click on Gen.Data File to generate PDF file of the report.



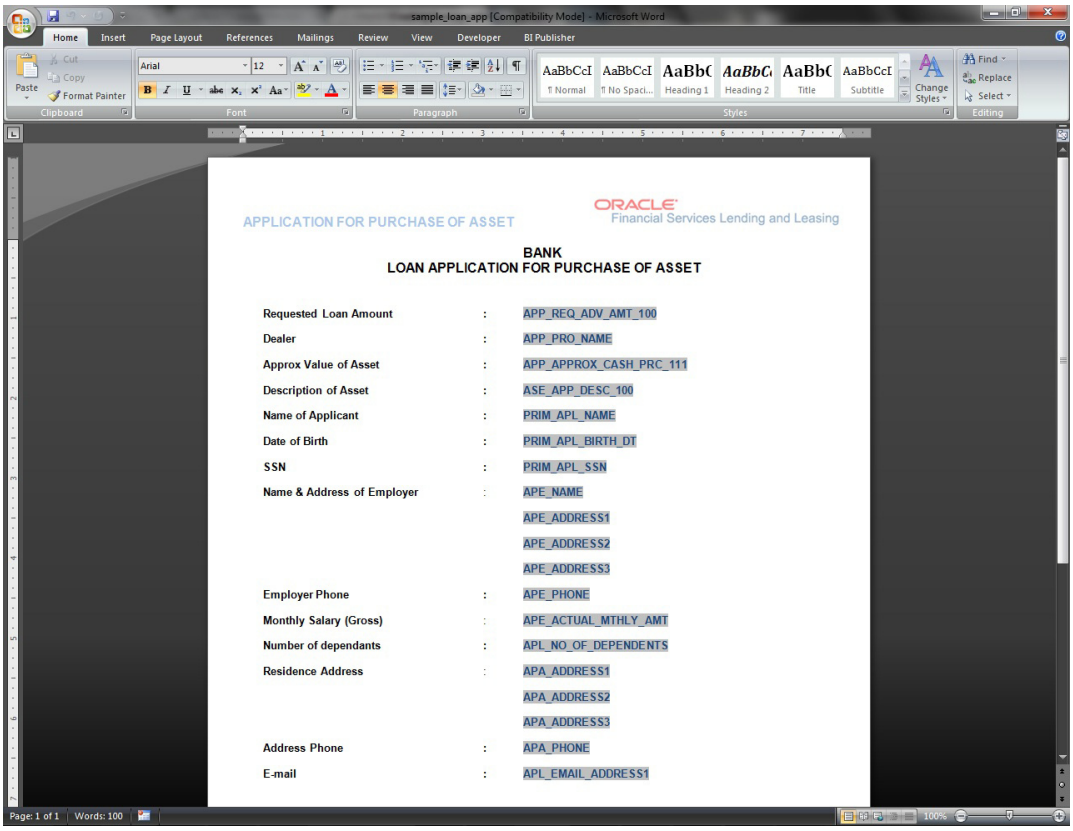
5. Copy and save the content in the pdf file as an xml file. The saved xml file should have the same name as entered in the Code column of Document Definition section. *For Example:* SAMPLE_LOAN_APP.xml.
6. Open MS Word.

Note

Oracle Financial Services Software assumes that BIP Desktop Tool is installed and the user is familiar with the BIP Report Tool.

7. In BI Publisher Tab in MS Word, click on Sample XML and import the saved xml file. *For Example:* SAMPLE_LOAN_APP.xml.

8. Create the template by inserting required elements tag.



9. The template created in MS Word should be saved with **.rtf** extension. *For Example*: SAMPLE_LOAN_APP.rtf

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Note

The **.xml** and **.rtf** file should be saved with the same name as entered in the 'Code' column of Document Definition section.

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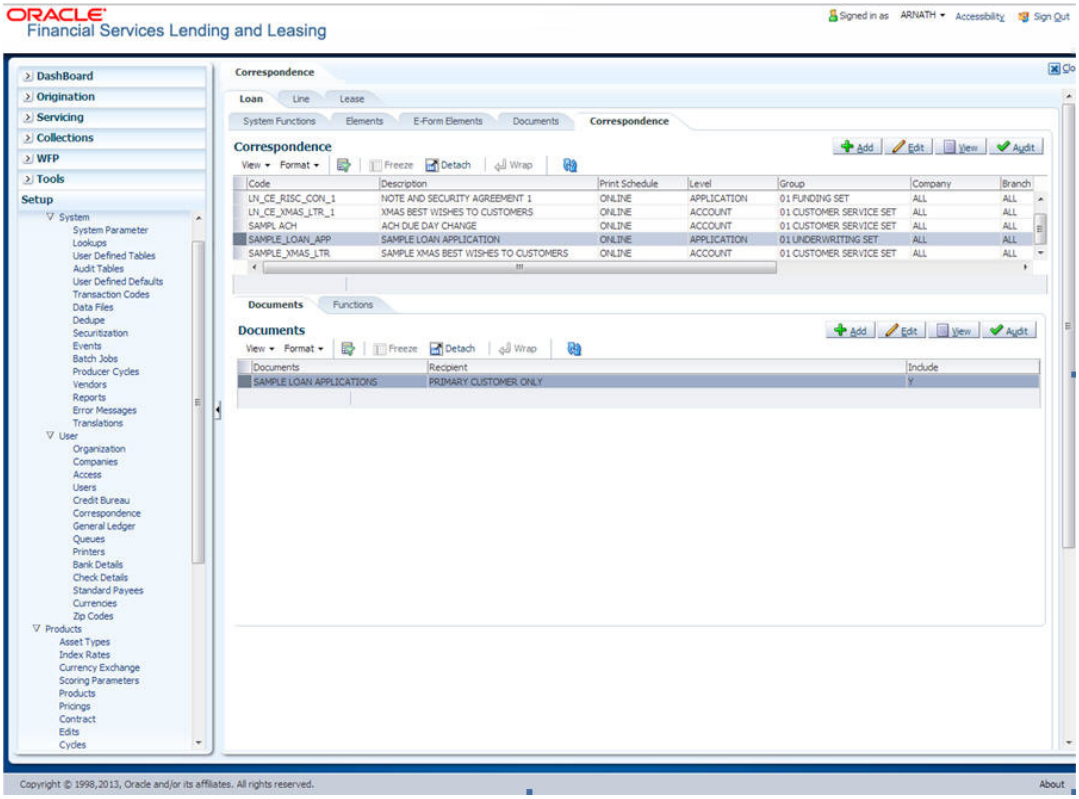
10. Upload the rtf template in the BIP and create the data model with SQL query as "select CDO_XML_DOCUMENT from correspondence_docs where cdo_id = :docId".

11. After the data model creation, launch the correspondence screen and click Correspondence tab.

12. You can setup a correspondence with the created doc.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Signed in as ARNATH
Accessibility
Sign Out
DashBoard
Origination
Servicing
Collections
WFP
Tools
Setup
System
System Parameter
Lookups
User Defined Tables
Audit Tables
User Defined Defaults
Transaction Codes
Data Files
Dedupe
Securitization
Events
Batch Jobs
Producer Cycles
Vendors
Reports
Error Messages
Translations
User
Organization
Companies
Access
Users
Credit Bureau
Correspondence
General Ledger
Queues
Printers
Bank Details
Check Details
Standard Payees
Currencies
Zip Codes
Products
Asset Types
Index Rates
Currency Exchange
Scoring Parameters
Products
Pricings
Contract
Edits
Cycles
Correspondence
Loan
Line
Lease
System Functions
Elements
E-Form Elements
Documents
Correspondence
Add
Edit
View
Audit
View
Format
Freeze
Detach
Wrap
Code
Description
Print Schedule
Level
Group
Company
Branch
LN_CE_RISC_CON_1
NOTE AND SECURITY AGREEMENT 1
ONLINE
APPLICATION
01 FUNDING SET
ALL
ALL
LN_CE_XMAS_LTR_1
XMAS BEST WISHES TO CUSTOMERS
ONLINE
ACCOUNT
01 CUSTOMER SERVICE SET
ALL
ALL
SAMPL ACH
ACH DUE DAY CHANGE
ONLINE
ACCOUNT
01 CUSTOMER SERVICE SET
ALL
ALL
SAMPLE_LOAN_APP
SAMPLE LOAN APPLICATION
ONLINE
APPLICATION
01 UNDERWRITING SET
ALL
ALL
SAMPLE_XMAS_LTR
SAMPLE XMAS BEST WISHES TO CUSTOMERS
ONLINE
ACCOUNT
01 CUSTOMER SERVICE SET
ALL
ALL
Documents
Functions
Documents
Add
Edit
View
Audit
View
Format
Freeze
Detach
Wrap
Documents
Recipient
Include
SAMPLE LOAN APPLICATIONS
PRIMARY CUSTOMER ONLY
Y
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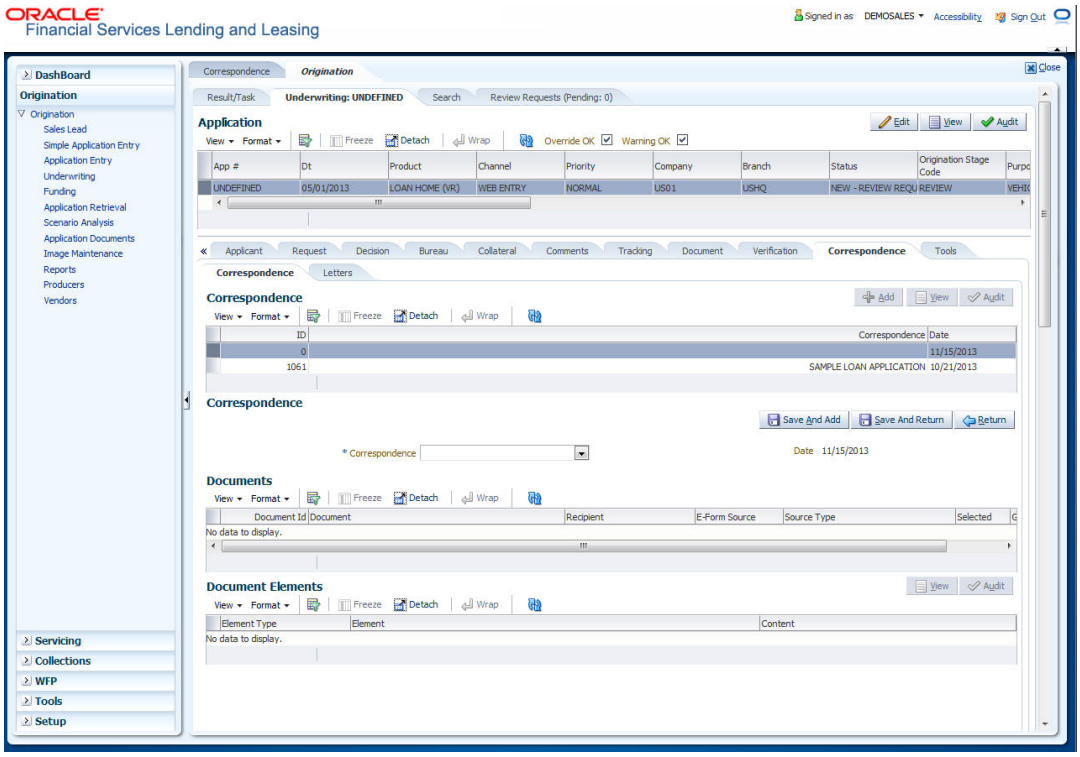
About

3. Generating Correspondence

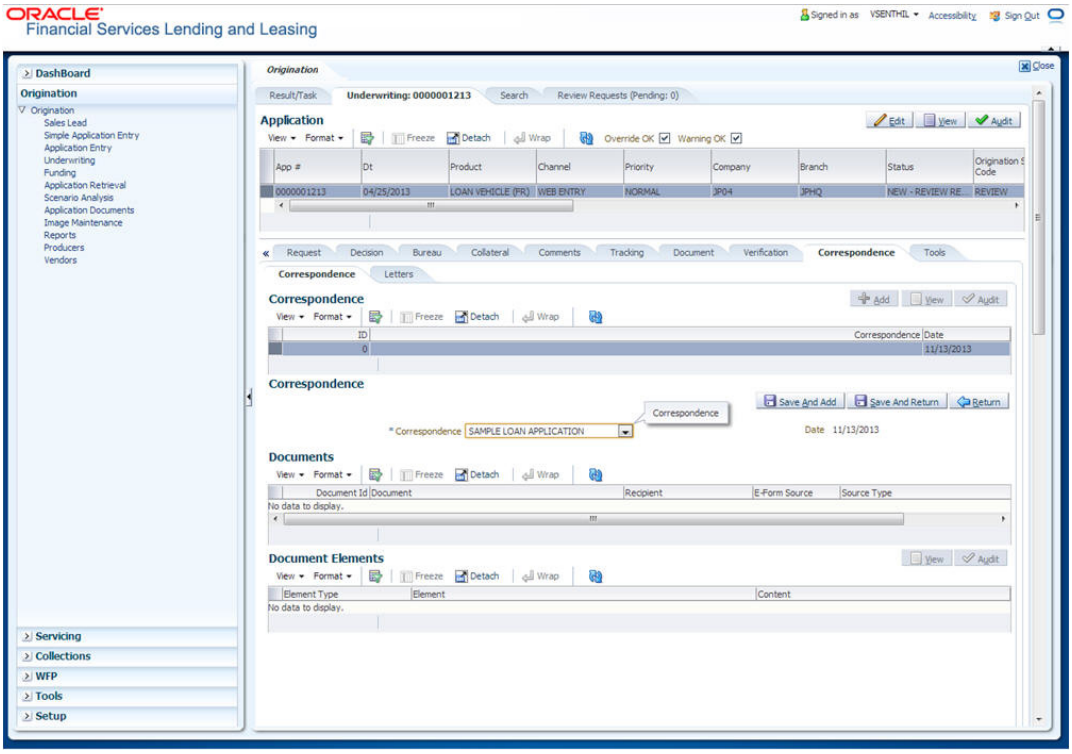
You can generate a correspondence once the respective correspondence is created in the database.

To generate a Correspondence

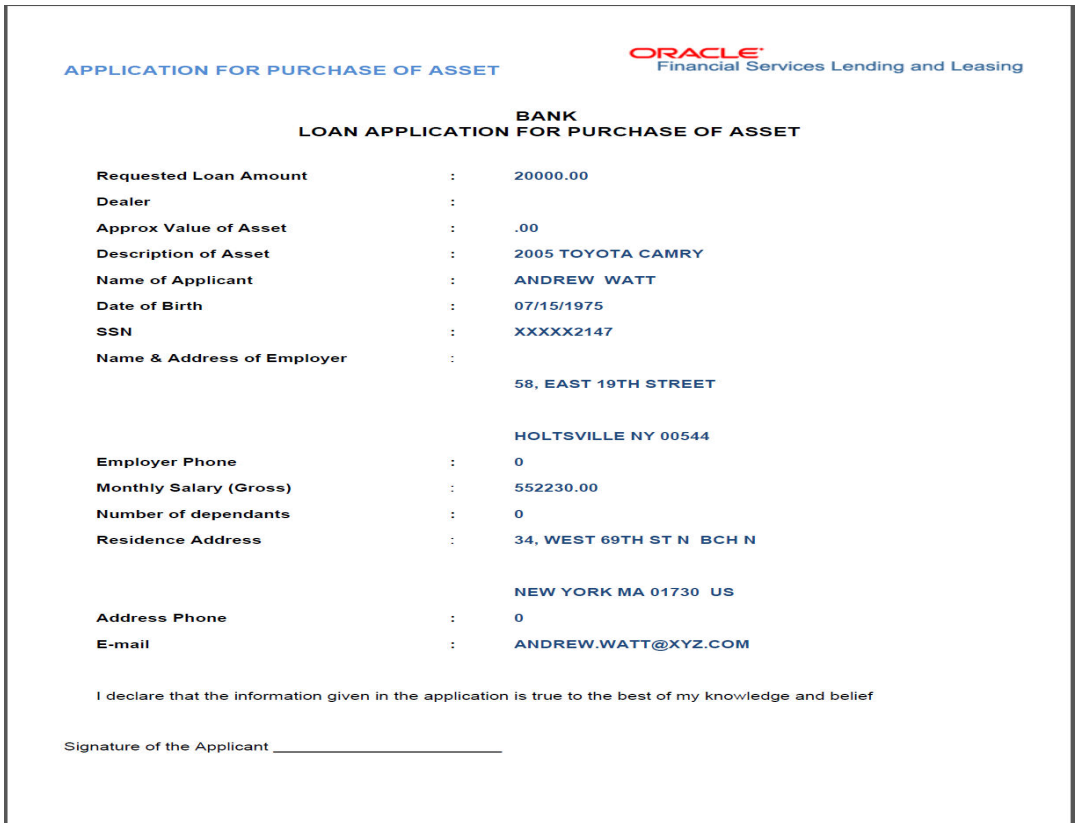
1. On the Oracle Financial Services Lending and Leasing home page, click **Origination→Origination→ Underwriting**
2. Open the application for which the correspondence should be generated.
3. Click **Correspondence** tab. In the **Correspondence** section, click on **Add.**



4. Select the created **Correspondence.** Click **Save and Add** to save and add a new record. Click to **Save and Return** save and return to main screen. Click **Return** to return to main screen without modifications.



5. Click **Generate** to generate the selected correspondence and **View Correspondence** to view the Correspondence in PDF format.



APPLICATION FOR PURCHASE OF ASSET

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Financial Services Lending and Leasing

BANK
LOAN APPLICATION FOR PURCHASE OF ASSET

Requested Loan Amount	:	20000.00
Dealer	:	
Approx Value of Asset	:	.00
Description of Asset	:	2005 TOYOTA CAMRY
Name of Applicant	:	ANDREW WATT
Date of Birth	:	07/15/1975
SSN	:	XXXXX2147
Name & Address of Employer	:	
		58, EAST 19TH STREET
		HOLTSVILLE NY 00544
Employer Phone	:	0
Monthly Salary (Gross)	:	552230.00
Number of dependants	:	0
Residence Address	:	34, WEST 69TH ST N BCH N
		NEW YORK MA 01730 US
Address Phone	:	0
E-mail	:	ANDREW.WATT@XYZ.COM

I declare that the information given in the application is true to the best of my knowledge and belief

Signature of the Applicant _____